

Valmont Industries Inc. (VMI)

NYSE; manufacturing; SIC 3440, Fabricated Structural Metal Products; CIK 0000102729

Valmont Industries Inc.

VMI; manufacturing

Grade

B

A

B

C

D

E

second fifth of 255 graded peers

percentile 23.2; sampling error 3.0 points; lower is stronger

Rank

60 of 255

Profitability

B

percentile 34.9

Solvency

B

percentile 32.2

Growth and financing

C

percentile 51.4

Reliability

0.94 AUC

filers with over \$2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025

Peer failure rate

0.52% a year

Item 1.03 bankruptcies, same asset band, 2012 to 2025

Size band

over \$2.67B assets

total assets \$3.4B

Standard universe

inside

revenue above \$1M and assets above \$10M

Warnings

none active

not computable: distress

Inputs computable

12 of 14

Graded from

filings received through Feb 24, 2026

227 days before the rescans; latest periodic filing 10-Q received Jul 28, 2026

Last close

\$469.15

2026-10-08; market equity \$9.1B

Price used in grade

None



B, the elk

second fifth of its sector; letters are fifths of the 255 graded peers

Share price, twelve months to the rescans

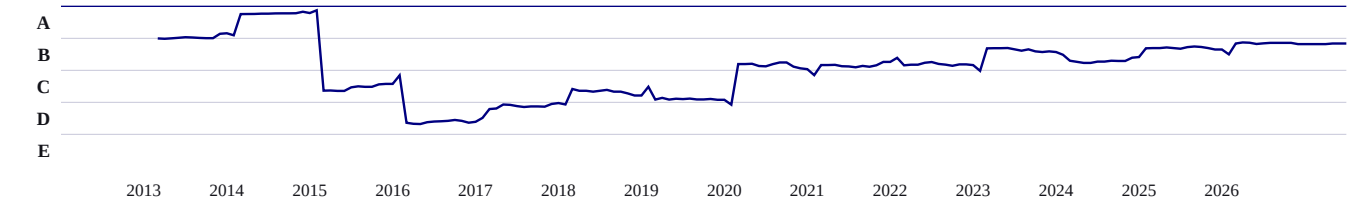
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: A/B from Apr 21, 2026, B from Jun 21, 2026, A/B from Sep 26, 2026, B from Sep 30, 2026

Letter at every rescans

Jan 21, 2012 to Oct 9, 2026; sector percentile, stronger toward the top; facts filed by each date only



Business, in the company's words

opening of Item 1 of the 10-K received Feb 24, 2026

Valmont Industries, Inc., along with its subsidiaries (collectively referred to as the "Company," "Valmont," "we," "us," or "our"), is a diversified manufacturer of products and services for infrastructure and agriculture markets. Founded in 1946 and headquartered in Omaha, Nebraska, our purpose is to conserve resources and improve life. We have been publicly traded since 1968, with our shares listed on the New York Stock Exchange under the ticker symbol "VMI."

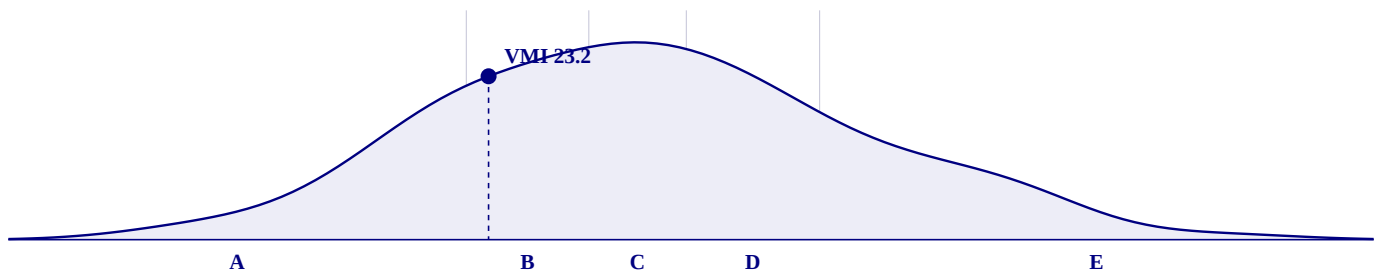
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 34.9						
Gross profitability		36.8%	21.9%	13.5	275	2025-12-27
Return on invested capital		17.9%	9.7%	20.2	100	2025-12-27
Accruals ratio		(3.2%)	(3.6%)	53.4	308	2025-12-27
Gross margin stability, five years		2.2 pts	2.1 pts	52.6	229	2025-12-27
Solvency, sleeve percentile 32.2						
Twelve-month failure probability		not computable	0.04%			latest liabilities, cash plus short-term investments, book equity, and shares are required
Altman Z double-prime		6.80	3.66	18.1	244	2025-12-27
Net debt to EBITDA		1.21x	1.78x	33.3	121	2025-12-27
Interest coverage		not computable	5.09x			latest aligned inputs end 2023-12-30; latest annual assets end 2025-12-27
Current ratio		2.35x	2.25x	45.1	325	2025-12-27
Growth and financing, sleeve percentile 51.4						
Revenue growth, three-year compound		(1.9%)	2.1%	67.9	269	2025-12-27
Free cash flow growth, three-year compound		10.2%	13.9%	59.4	139	2025-12-27
Reinvestment rate		44.3%	26.4%	37.7	139	2025-12-27
Asset growth, three years		(1.8%)	4.4%	74.5	279	2025-12-27
Net share issuance, one year		(2.5%)	0.01%	17.8	243	2026-02-20

Among 255 peers

manufacturing; letters are fifths of this list



Composite score of every graded peer, smoothed; vertical rules are the letter band edges; stronger to the left.

Rank	Company	Percentile	Letter	Warnings
55	Ilex Corp. (IEX)	21.3	A/B	
56	Curtiss Wright Corp. (CW)	21.7	A/B	
57	Donaldson Co. Inc. (DCI)	22.0	A/B	
58	Quanex Building Products Corp. (NX)	22.4	A/B	
59	Middleby Corp. (MIDD)	22.8	A/B	
60	Valmont Industries Inc. (VMI) <	23.2	B	
61	AAR Corp. (AIR)	23.6	B	
62	Aptargroup, Inc. (ATR)	24.0	B	
63	AeroVironment Inc. (AVAV)	24.4	B	
64	Griffon Corp. (GFF)	24.8	B	

What the price implies

at the 2026-10-08 close; none enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	21.5%	13.7%	56
Distance from 52-week high	(19.7%)	(24.3%)	61
EBIT to enterprise value	4.3%	4.1%	52
Free cash flow yield	3.4%	3.4%	51
Book value to price	0.19	0.34	25
Sales to price	0.45	0.54	40
Composite equity issuance, five years	(14.0%)	(9.5%)	35
Relative strength against the sector, log excess return	0.06	(0.00)	56

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 7 of 9, period end 2025-12-27	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$139.1M
Operating cash flow, four quarters	\$475.3M
Months of runway	not finite
Days since last periodic filing	73 (10-Q received Jul 28, 2026)
Median daily dollar volume, 63 sessions	\$82.2M

Sources

each row links to the filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	gross profit	us-gaap:GrossProfit	\$1.2B	2025-12-27	2026-02-24	10-K	0000102729-26-000007
2	assets	us-gaap:Assets	\$3.4B	2025-12-27	2026-02-24	10-K	0000102729-26-000007
3	operating income	us-gaap:OperatingIncomeLoss	\$415.6M	2025-12-27	2026-02-24	10-K	0000102729-26-000007
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesMinorityInterestAndLossFromEquityMethodInvestments	\$379.6M	2025-12-27	2026-02-24	10-K	0000102729-26-000007
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$23.9M	2025-12-27	2026-02-24	10-K	0000102729-26-000007
6	total debt	us-gaap:LongTermDebt	\$795.7M	2025-12-27	2026-02-24	10-K	0000102729-26-000007
7	book equity	us-gaap:StockholdersEquity	\$1.6B	2025-12-27	2026-02-24	10-K	0000102729-26-000007
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$187.1M	2025-12-27	2026-02-24	10-K	0000102729-26-000007
9	total debt	us-gaap:LongTermDebt	\$730.6M	2024-12-28	2026-02-24	10-K	0000102729-26-000007
10	book equity	us-gaap:StockholdersEquity	\$1.5B	2024-12-28	2026-02-24	10-K	0000102729-26-000007
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$164.3M	2024-12-28	2026-02-24	10-K	0000102729-26-000007
12	net income	us-gaap:NetIncomeLoss	\$350.3M	2025-12-27	2026-02-24	10-K	0000102729-26-000007
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$456.5M	2025-12-27	2026-02-24	10-K	0000102729-26-000007
14	assets	us-gaap:Assets	\$3.3B	2024-12-28	2026-02-24	10-K	0000102729-26-000007
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$4.1B	2025-12-27	2026-02-24	10-K	0000102729-26-000007
16	gross profit	us-gaap:GrossProfit	\$1.2B	2024-12-28	2026-02-24	10-K	0000102729-26-000007
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$4.1B	2024-12-28	2026-02-24	10-K	0000102729-26-000007
18	gross profit	us-gaap:GrossProfit	\$1.2B	2023-12-30	2026-02-24	10-K	0000102729-26-000007
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$4.2B	2023-12-30	2026-02-24	10-K	0000102729-26-000007
20	gross profit	us-gaap:GrossProfit	\$1.1B	2022-12-31	2025-02-25	10-K	0000102729-25-000009
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$4.3B	2022-12-31	2025-02-25	10-K	0000102729-25-000009

22	gross profit	us-gaap:GrossProfit	\$883.9M	2021-12-25	2024-02-28	10-K	0000102729-24-000013
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$3.5B	2021-12-25	2024-02-28	10-K	0000102729-24-000013
24	current assets	us-gaap:AssetsCurrent	\$1.7B	2025-12-27	2026-02-24	10-K	0000102729-26-000007
25	current liabilities	us-gaap:LiabilitiesCurrent	\$731.6M	2025-12-27	2026-02-24	10-K	0000102729-26-000007
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$3.2B	2025-12-27	2026-02-24	10-K	0000102729-26-000007
27	liabilities	us-gaap:Liabilities	\$1.7B	2025-12-27	2026-02-24	10-K	0000102729-26-000007
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$88.5M	2025-12-27	2026-02-24	10-K	0000102729-26-000007
29	operating income	us-gaap:OperatingIncomeLoss	\$291.6M	2023-12-30	2026-02-24	10-K	0000102729-26-000007
30	interest expense	us-gaap:InterestExpense	\$56.8M	2023-12-30	2024-02-28	10-K	0000102729-24-000013
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$145.0M	2025-12-27	2026-02-24	10-K	0000102729-26-000007
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$572.7M	2024-12-28	2026-02-24	10-K	0000102729-26-000007
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$79.5M	2024-12-28	2026-02-24	10-K	0000102729-26-000007
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$306.8M	2023-12-30	2026-02-24	10-K	0000102729-26-000007
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$96.8M	2023-12-30	2026-02-24	10-K	0000102729-26-000007
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$326.3M	2022-12-31	2025-02-25	10-K	0000102729-25-000009
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$93.3M	2022-12-31	2025-02-25	10-K	0000102729-25-000009
38	current assets	us-gaap:AssetsCurrent	\$1.7B	2024-12-28	2026-02-24	10-K	0000102729-26-000007
39	current liabilities	us-gaap:LiabilitiesCurrent	\$811.4M	2024-12-28	2026-02-24	10-K	0000102729-26-000007
40	assets	us-gaap:Assets	\$3.5B	2023-12-30	2025-02-25	10-K	0000102729-25-000009
41	assets	us-gaap:Assets	\$3.6B	2022-12-31	2024-02-28	10-K	0000102729-24-000013
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	19,535,262	2026-02-20	2026-02-24	10-K	0000102729-26-000007
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	20,045,509	2025-02-21	2025-02-25	10-K	0000102729-25-000009